How to enter goals

Summary

After completing the Goal Tracking worksheets, you are ready to enter the goal information into dynaMACS.

Requirements

Knowledge of Sales Entry, FAQ GEN-101
Completion of FAQ GT-101 Getting Started with Goal Tracking

Module

Goal Tracking

Important Notes

- We will use Sales Entry to process goals.
- The "Process Month" for the session should be set to the first month of your fiscal year.
- The "Post Month" for each entry is IMPORTANT - it determines the year for the Goals and must be set to the first month of your fiscal year.
- The invoice number of @GOAL (make sure that GOAL is in Uppercase) determines that an entry is a goal and not a normal sales entry. Anything other than @GOAL (Uppercase) will be treated as a sales entry.
- Once posted, goal entries can not be printed via detailed reports. *If you want an audit trail listing of the goals entries, make sure to print a session listing before the entries are posted.*
- To adjust an existing goal, enter a credit or additional amount to the total goal.
- If you make an entry to a manufacturer/customer that already has a goal, the new entry ADDS to (or SUBTRACTS from) the existing entry.

Solution

Preparation for Entering Goals:

Determine what Post Month to use for your entries. The Post Month for each goal entry is important as it determines the year that the goal will be applied to and should be set to the first month of your fiscal year. Review the following two situations:

1. An agency that normally uses a Year-End of December for sales reports should enter goals as follows:

   - Goal for year end December 2007, use Post Month = 01/2007
   - Goal for year end December 2008, use Post Month = 01/2008

2. An agency that normally uses a Year-End of September for sales reports should enter goals as follows:

   - Goal for October, 2006 - September 2007, Post Month = 10/2006
   - Goal for October, 2006 - September 2007, Post Month = 10/2007

Goal Entry Process:

1. Start a sales entry session with a process month set to the first month of your fiscal year.

2. Select a manufacturer that you wish to track goals for. If you are not tracking goals by individual manufacturer then setup a manufacturer called Mfg Goals. (See FAQ GEN-101 How To set up Misc. Accounts)

3. Select the first customer that you wish to track goals for. If you are only tracking goals by manufacturer, you must set up a customer called Cst Goals. .(See FAQ GEN-101 How To set up Misc. Accounts)

    > **IF** you use a customer called Goals and you wish to track Goals by individual sales rep, you will need to override the sales rep for each entry because only one sales rep can be assigned to this customer.

4. In the invoice number field, type @GOAL (in all Upper case, no spaces).

5. In the invoice date field, type the first day of the fiscal year-end month. Example: If you are entering goal for 2007, type 01/01/07 for a calendar year-end. For a fiscal year-end of September 2007 type 10/01/06.

6. The post month field should automatically default to the same month and year as the invoice date. Example: 01/07 for calendar 2007 year-end or 10/06 for a fiscal September 2007 year-end.

7. In the Sales ($) field, enter the annual sales goal for this entry. If your goal is above 9 million, you will need to make multiple entries.

8. The Commission ($) field is automatically calculated based on the normal commission calculations, but can be overridden with a specific commission goal. If you wish to enter commission goals by percentage enable the Comm % field.

9. Select [Save] to save the entry.

10. The screen clears and the cursor will be flashing in the customer field for the next customer to be entered. Go to step 3 to enter more goals for this manufacturer and step 2 to change manufacturers.

11. After finishing entries, choose [Exit] then select [End Session].

12. The Session Summary window appears. Select [Accept].

13.   If there is a difference and you are finished with the session, select [Change] to change the Control Total then select [Accept] to accept the new total.

14.   Print the session(s) to keep as an audit trail and verify as a Goal Tracking session is not kept after posting.

15.   We can now start a new session to enter more goals. ***Note:*** *The latest enhancement allows **adding/subtracting** figures from existing goal values by putting additional entries to the same Manufacturer/Customer, which is the same as the regular Sales Entry. This allows maintaining goals over 9 Million by entering multiple entries to make up the amount in excess $9,999,999.00 This supersedes the old method which **replaced** goal values if you entered additional entries to the same Manufacturer/Customer.*

16.   Select the [Post Session] to post all the sessions. ***Note:*** *All sessions must be balanced and will post including any regular Sales Entry or Commission Reconciliation sessions.*

17.   We can now review Goals in Sales IQ or print the Goal Tracking Sales Analysis Reports (See Monitoring Goal Performance topic under Goal Tracking book in dynaHELP).